Shell & Willmer  — LL.P.  LAW OFFICES  350 South Grand Avenue, Suite 2600, Two California Plaza Los Angeles, California 90071  (213) 929-2500	3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27	CENTRAL DISTRIC	DISTRICT COURT CT OF CALIFORNIA N DIVISION Case No. SACV11-01309-DOC (ANx) Hon. David O. Carter, Ctrm. 9D  JAMES R. GLIDEWELL DENTAL CERAMICS, INC.'S MEMORANDUM OF CONTENTIONS OF FACT AND LAW  Pre-Trial Conf.: January 28, 2013 Jury Trial: February 26, 2013
	28		CLIDEWELL'S MEMORANDURA OF COMPENSACE

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Pursuant to Local Rule 16-4. Plaintiff and counter-defendant James R. Glidewell Dental Ceramics, Inc. ("Glidewell") hereby submits this Memorandum of Contentions of Fact and Law.

#### I. GLIDEWELL'S CLAIMS

### Summary Statement of the Claims Glidewell has Pleaded and **A. Plans to Pursue**

Claim 1: Keating has infringed and continues to infringe Glidewell's rights in its federally registered Trademark Reg. No. 3,739,663 in violation of section 32(a) of the Lanham Act, § 1114;

Claim 2: Keating has infringed and continues to infringe Glidewell's rights in its unregistered BruxZir mark in violation of section 43(a) of the Lanham Act, 15 U.S.C. § 1125;

Claim 3: Keating has engaged and continues to engage in unfair competition in violation of Cal. Bus. & Prof. Code § 17200 et seq.

#### В. **Elements Required to Establish Glidewell 's Claims**

#### Glidewell's Claim 1: Infringement of Federally Registered 1. Trademark

- BruxZir is a valid, protectable trademark; a.
- Glidewell owns the BruxZir trademark; and b.
- Keating's use of KDZ Bruxer, without Glidewell's c.

21 consent, is likely to cause consumer confusion.

> See Ninth Circuit Manual of Model Civil Jury Instructions No. 15.5; Rearden LLC v. Rearden Commerice, Inc., 683 F.3d 1190, 1202 (9th Cir. 2012); Brookfield Communications, Inc. v. West Coast Entertainment Corp., 174 F.3d 1036, 1046 (9<sup>th</sup> Cir. 1999).

## Glidewell's Claim 2: Violation of Lanham Act, Section 2. 43(a)

BruxZir is a valid, protectable trademark; a.

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- c. Considering the balance of hardships between the Glidewell and Keating, a remedy in equity is warranted; and
- The public interest would not be disserved by a permanent injunction.

See eBay Inc. v. MerExchange, L.L.C., 547 U.S. 388, 391 (2006); Cal. Bus. & Prof. Code § 17203 (injunction available for violation of section 17200).

### C. Brief Description of Key Evidence in Support of Glidewell's **Claim for Infringement of a Federally Registered Trademark**

Plaintiff identifies at least the following key evidence in support of its claims. Plaintiff reserves the right to enlarge or otherwise modify this list.

#### Glidewell's Claim 1: Infringement of Federally Registered 1. **Trademark**

- Testimony of James Shuck concerning creation of the BruxZir mark; advertising and promotion of the BruxZir mark and BruxZir-branded products; development, features, characteristics, and indicated uses of BruxZir-branded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer"; the commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods.
- Testimony of Dr. Michael DiTolla concerning creation of the BruxZir mark; advertising and promotion of the BruxZir mark and BruxZir-branded products; development, features, characteristics, and indicated uses of BruxZirbranded products; use of the terms "bruxer" and "bruxer crown" in the dental

industry; generic terms for full contour zirconia crowns; treatments for patients with
bruxism; facts indicating non-genericness of the BruxZir mark; facts indicating the
strength of the BruxZir mark and its indication of Glidewell Laboratories as a
source of goods and services; facts relating to likelihood of confusion between the
BruxZir mark and "KDZ Bruxer"; pronunciation of the terms "BruxZir" and
"bruxer" by dental practitioners; the commercial strength of the BruxZir mark, the
proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the
channels through which BruxZir and KDZ Bruxer brand goods are marketed, the
type of goods marketed under those marks, and the degree of care typically used in
selecting a particular brand of such goods. Expert testimony concerning
distinctiveness (and nongenericness) of the BruxZir mark, including that the mark
is suggestive; generic terms for full contour zirconia crowns; treatments for patients
with bruxism.

- Testimony of Nicole Fallon concerning one or more instances of actual confusion.
- Testimony of Robin Bartolo concerning development, features, characteristics, and indicated uses of BruxZir-branded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; and operation of Glidewell's Authorized Labs program, Glidewell Direct, and Glidewell's interactions with Authorized BruxZir Labs.
- Testimony of Robin Carden concerning development, features, characteristics, and indicated uses of BruxZir-branded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; Glidewell's interactions with Authorized BruxZir Labs and operation of Glidewell's

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- Authorized Labs program; and commercial strength of the BruxZir mark, including technical and educational presentations concerning BruxZir brand product.
- Testimony of Rudy Ramirez concerning creation of the BruxZir mark; development, features, characteristics, and indicated uses of BruxZir-branded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the commercial strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services.
- Testimony of Keith Allred concerning Glidewell's ownership of the BruxZir mark and Trademark Reg. No. 3,739,663, and Glidewell's enforcement of its rights in the BruxZir mark.
- Testimony of Glenn Sasaki concerning Glidewell's damages and Keating's profits.
- Testimony of Ronald Goldstein, D.D.S. concerning the validity (distinctiveness and nongenericness) of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, the degree of care typically used in selecting a particular brand of such goods, and the likelihood of confusion resulting from Keating's use of KDZ Bruxer; generic terms for full contour zirconia crowns; treatments for patients with bruxism
- Testimony of David Franklyn concerning the validity (distinctiveness and nongenericness) of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, the degree of care typically used in selecting a particular brand of such goods, and the likelihood

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of confusion resulting from Keating's use of KDZ Bruxer.

- Testimony of Gregory Doneff, D.D.S. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Howard Cohen, D.D.S. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Spencer Luke, D.M.D. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark;

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facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."

- Testimony of Stuart Newman, D.D.S. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Thomas Bell, D.M.D. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Terence Michiels, D.D.S. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in

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selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."

- Testimony of Kent Toca, D.D.S. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Dr. Michael Fanning concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Dr. Vincent S. Cianciulli concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the

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type of goods marketed under those marks, and the degree of care typically used in
selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer
crown" in the dental industry; facts indicating non-genericness of the BruxZir mark
facts indicating the strength of the BruxZir mark and its indication of Glidewell
Laboratories as a source of goods and services; facts relating to likelihood of
confusion between the BruxZir mark and "KDZ Bruxer."

- Testimony of Dr. Ilya Benjamin concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Dr. Dean Saiki concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
  - Testimony of Dr. Robert McNicholas concerning the validity of the

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BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the
proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the
channels through which BruxZir and KDZ Bruxer brand goods are marketed, the
type of goods marketed under those marks, and the degree of care typically used in
selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer
crown" in the dental industry; facts indicating non-genericness of the BruxZir mark
facts indicating the strength of the BruxZir mark and its indication of Glidewell
Laboratories as a source of goods and services; facts relating to likelihood of
confusion between the BruxZir mark and "KDZ Bruxer."

- Testimony of Dr. Benjamin An concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Dr. Oscar Goren concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of

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confusion between the BruxZir mark and "KDZ Bruxer."

- Testimony of Dr. Dennis A. Gaishauser concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Dr. Dr. Chester A. Bizga concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Dr. Valentine Ferraris concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark;

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facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."

- Testimony of Dr. Paul Taylor concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Dr. Meredith S. Esposito concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Dr. John Griffith concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in

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selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer
crown" in the dental industry; facts indicating non-genericness of the BruxZir mark
facts indicating the strength of the BruxZir mark and its indication of Glidewell
Laboratories as a source of goods and services; facts relating to likelihood of
confusion between the BruxZir mark and "KDZ Bruxer."

- Testimony of Scott Bigler concerning the validity and commercial strength of the BruxZir mark, and Glidewell Direct and Glidewell's interactions with Authorized BruxZir Labs.
- Testimony of Glenn Yamamoto concerning the validity and commercial strength of the BruxZir mark, and Glidewell Direct and Glidewell's interactions with Authorized BruxZir Labs.
- Testimony of Jacob Trachsel concerning the validity and commercial strength of the BruxZir mark, and Glidewell Direct and Glidewell's interactions with Authorized BruxZir Labs.
- Testimony of Kareen Chamberlain concerning the validity and commercial strength of the BruxZir mark, and Glidewell Direct and Glidewell's interactions with Authorized BruxZir Labs.
- Testimony of Shaun Keating concerning or constituting admissions that the BruxZir mark is nongeneric; advertising and promotion of the BruxZir mark and BruxZir-branded products; development, features, characteristics, and indicated uses of BruxZir-branded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer"; the commercial strength of the BruxZir mark; the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks; the channels through which BruxZir and KDZ Bruxer brand goods are marketed; Keating's intent in selecting the KDZ Bruxer mark; the type of

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goods marketed under those marks; and the degree of care typically used in selecting a particular brand of such goods.

- Testimony of Robert Brandon concerning or constituting admissions that the BruxZir mark is nongeneric; advertising and promotion of the BruxZir mark and BruxZir-branded products; development, features, characteristics, and indicated uses of BruxZir-branded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer"; the commercial strength of the BruxZir mark; the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks; the channels through which BruxZir and KDZ Bruxer brand goods are marketed; Keating's intent in selecting the KDZ Bruxer mark; the type of goods marketed under those marks; and the degree of care typically used in selecting a particular brand of such goods.
- Testimony of Diane Donich concerning Keating's sales of and profits from sales of product under the KDZ Bruxer mark.
- Reports showing Keating marketing expenses and sales. (Exs. 515, 943-46)
- Documents showing Glidewell's expenses to promote and market the BruxZir mark and BruxZir-branded products. (E.g., Exs. 1550, 1564-68)
  - Reports showing Glidewell website statistics. (Exs. 1549, 1551-52)
- Reports showing unit sales and revenues of BruxZir brand product. (Exs. 599, 1531-32, 1560-61)
  - List of Authorized BruxZir Labs. (Ex. 10)
- Exemplars of the BruxZir and KDZ Bruxer marks as they appear in the marketplace. (Exs. 559, 615, 948, 1171, 1176, 1488-91)
  - Call note report, and invoice and fax transmittal, regarding contact

- Documents evidencing Keating's first use of the KDZ Bruxer mark in the marketplace. (E.g., Ex. 1342)
- Documents evidencing that neither "bruxzir crown" nor "bruxer crown" were generic terms for full contour zirconia crowns prior to April 2011.

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(E.g., Ex. 2140)

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- Documents evidencing Glidewell's sales, revenues, and gross profit of KDZ Bruxer crowns. (E.g., Exs. 1531, 1532, 1560, 1561, 1566, 1567, 1568)
- Documents evidencing Keating's sales, revenues, and gross profit of its KDZ Bruxer crowns. (E.g., Ex. 1051)

#### **Glidewell's Claim 2: False Designation of Origin Under** 2. Lanham Act, Section 43(a)

- Testimony of James Shuck concerning creation of the BruxZir mark; advertising and promotion of the BruxZir mark and BruxZir-branded products; development, features, characteristics, and indicated uses of BruxZir-branded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer"; the commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods.
- Testimony of Dr. Michael DiTolla concerning creation of the BruxZir mark; advertising and promotion of the BruxZir mark and BruxZir-branded products; development, features, characteristics, and indicated uses of BruxZirbranded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; generic terms for full contour zirconia crowns; treatments for patients with bruxism; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer"; pronunciation of the terms "BruxZir" and

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"bruxer" by dental practitioners; the commercial strength of the BruxZir mark, the
proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the
channels through which BruxZir and KDZ Bruxer brand goods are marketed, the
type of goods marketed under those marks, and the degree of care typically used in
selecting a particular brand of such goods. Expert testimony concerning
distinctiveness (and nongenericness) of the BruxZir mark, including that the mark
is suggestive; generic terms for full contour zirconia crowns; treatments for patients
with bruxism.

- Testimony of Nicole Fallon concerning one or more instances of actual confusion.
- Testimony of Robin Bartolo concerning development, features, characteristics, and indicated uses of BruxZir-branded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; and operation of Glidewell's Authorized Labs program, Glidewell Direct, and Glidewell's interactions with Authorized BruxZir Labs.
- Testimony of Robin Carden concerning development, features, characteristics, and indicated uses of BruxZir-branded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; Glidewell's interactions with Authorized BruxZir Labs and operation of Glidewell's Authorized Labs program; and commercial strength of the BruxZir mark, including technical and educational presentations concerning BruxZir brand product.
- Testimony of Rudy Ramirez concerning creation of the BruxZir mark; development, features, characteristics, and indicated uses of BruxZir-branded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts

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indicating non-genericness of the BruxZir mark; facts indicating the commercial strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services.

- Testimony of Keith Allred concerning Glidewell's ownership of the BruxZir mark and Trademark Reg. No. 3,739,663, and Glidewell's enforcement of its rights in the BruxZir mark.
- Testimony of Glenn Sasaki concerning Glidewell's damages and Keating's profits.
- Testimony of Ronald Goldstein, D.D.S. concerning the validity (distinctiveness and nongenericness) of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, the degree of care typically used in selecting a particular brand of such goods, and the likelihood of confusion resulting from Keating's use of KDZ Bruxer; generic terms for full contour zirconia crowns; treatments for patients with bruxism
- Testimony of David Franklyn concerning the validity (distinctiveness and nongenericness) of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, the degree of care typically used in selecting a particular brand of such goods, and the likelihood of confusion resulting from Keating's use of KDZ Bruxer.
- Testimony of Gregory Doneff, D.D.S. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the

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type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."

- Testimony of Howard Cohen, D.D.S. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Spencer Luke, D.M.D. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Stuart Newman, D.D.S. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the

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proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."

- Testimony of Thomas Bell, D.M.D. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Terence Michiels, D.D.S. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."

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- Testimony of Kent Toca, D.D.S. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Dr. Michael Fanning concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Dr. Vincent S. Cianciulli concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell

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Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."

- Testimony of Dr. Ilya Benjamin concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Dr. Dean Saiki concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Dr. Robert McNicholas concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer"

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crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."

- Testimony of Dr. Benjamin An concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Dr. Oscar Goren concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Dr. Dennis A. Gaishauser concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the

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type of goods marketed under those marks, and the degree of care typically used in
selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer
crown" in the dental industry; facts indicating non-genericness of the BruxZir mark
facts indicating the strength of the BruxZir mark and its indication of Glidewell
Laboratories as a source of goods and services; facts relating to likelihood of
confusion between the BruxZir mark and "KDZ Bruxer."

- Testimony of Dr. Dr. Chester A. Bizga concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Dr. Valentine Ferraris concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Dr. Paul Taylor concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity

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of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."

- Testimony of Dr. Meredith S. Esposito concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Dr. John Griffith concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."

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- Testimony of Scott Bigler concerning the validity and commercial strength of the BruxZir mark, and Glidewell Direct and Glidewell's interactions with Authorized BruxZir Labs.
- Testimony of Glenn Yamamoto concerning the validity and commercial strength of the BruxZir mark, and Glidewell Direct and Glidewell's interactions with Authorized BruxZir Labs.
- Testimony of Jacob Trachsel concerning the validity and commercial strength of the BruxZir mark, and Glidewell Direct and Glidewell's interactions with Authorized BruxZir Labs.
- Testimony of Kareen Chamberlain concerning the validity and commercial strength of the BruxZir mark, and Glidewell Direct and Glidewell's interactions with Authorized BruxZir Labs.
- Testimony of Shaun Keating concerning or constituting admissions that the BruTestimony of Shaun Keating concerning or constituting admissions that the BruxZir mark is nongeneric; advertising and promotion of the BruxZir mark and BruxZir-branded products; development, features, characteristics, and indicated uses of BruxZir-branded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer"; the commercial strength of the BruxZir mark; the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks; the channels through which BruxZir and KDZ Bruxer brand goods are marketed; Keating's intent in selecting the KDZ Bruxer mark; the type of goods marketed under those marks; and the degree of care typically used in selecting a particular brand of such goods.
- Testimony of Robert Brandon concerning or constituting admissions that the BruxZir mark is nongeneric; advertising and promotion of the BruxZir

mark and BruxZir-branded products; development, features, characteristics, and
indicated uses of BruxZir-branded products; use of the terms "bruxer" and "bruxer
crown" in the dental industry; facts indicating non-genericness of the BruxZir mark
facts indicating the strength of the BruxZir mark and its indication of Glidewell
Laboratories as a source of goods and services; facts relating to likelihood of
confusion between the BruxZir mark and "KDZ Bruxer"; the commercial strength
of the BruxZir mark; the proximity of the goods marketed under the BruxZir and
KDZ Bruxer marks; the channels through which BruxZir and KDZ Bruxer brand
goods are marketed; Keating's intent in selecting the KDZ Bruxer mark; the type of
goods marketed under those marks; and the degree of care typically used in
selecting a particular brand of such goods.

- Testimony of Diane Donich concerning Keating's sales of and profits from sales of product under the KDZ Bruxer mark.
- Reports showing Keating marketing expenses and sales. (Exs. 515, 943-46)
- Documents showing Glidewell's expenses to promote and market the BruxZir mark and BruxZir-branded products. (E.g., Exs. 1550, 1564-68)
  - Reports showing Glidewell website statistics. (Exs. 1549, 1551-52)
- Reports showing unit sales and revenues of BruxZir brand product. (Exs. 599, 1531-32, 1560-61)
  - List of Authorized BruxZir Labs. (Ex. 10)
- Exemplars of the BruxZir and KDZ Bruxer marks as they appear in the marketplace. (Exs. 559, 615, 948, 1171, 1176, 1488-91)
- Call note report, and invoice and fax transmittal, regarding contact with Dr. Le's office. (Exs. 556-57)
- Keating prescription forms and lab notes. (Exs. 569, 1052, 1121, 1139, 1142, 1160)
  - Application for the BruxZir mark by Glidewell. (Ex. 608)

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- Documents showing examination of the BruxZir mark by the U.S.
   Patent and Trademark Office. (Exs. 608, 1466, 1467)
   Trademark Manual of Examining Procedure, 5<sup>th</sup> Ed. (excerpts). (Examining Procedure)
  - Trademark Manual of Examining Procedure, 5<sup>th</sup> Ed. (excerpts). (Ex. 1562)
  - Registration of the BruxZir mark by the U.S. Patent and Trademark Office. (Ex. 607)
  - Documents showing that the BruxZir mark does not exist in a crowded field (E.g., Exs. 618, 619)
    - Dictionary excerpts. (E.g., Ex. 614)
  - Advertising, marketing, and promotional material for the BruxZir mark and BruxZir-branded products. (E.g., Exs. 66-68, 562-568, 570, 575-576, 578-579, 610, 1055-1061)
  - Documents evidencing third party recognition of the BruxZir mark. (E.g., Exs. 580-591, 594-598)
  - Keating advertising and marketing material for KDZ Bruxer mark and BruxZir-branded products. (E.g., Exs. 570, 574)
  - Third party advertising and marketing material for full contour zirconia crowns. (E.g., Exs. 560, 1452)
  - Documents evidencing Glidewell's efforts to protect the BruxZir mark. (E.g., Exs. 141, 146-151)
  - Documents evidencing Keating's first use of the KDZ Bruxer mark in the marketplace. (E.g., Ex. 1342)
  - Documents evidencing that neither "bruxzir crown" nor "bruxer crown" were generic terms for full contour zirconia crowns prior to April 2011. (E.G., Ex. 2140)
  - Documents evidencing Glidewell's sales, revenues, and gross profit of KDZ Bruxer crowns. (E.g., Exs. 1531, 1532, 1560, 1561, 1566, 1567, 1568)
    - Documents evidencing Keating's sales, revenues, and gross profit of

## its KDZ Bruxer crowns. (E.g., Ex. 1051)

# 3. Glidewell's Claim 3: Unfair Competition Under Cal. Bus. & Prof. Code

- Testimony of James Shuck concerning creation of the BruxZir mark; advertising and promotion of the BruxZir mark and BruxZir-branded products; development, features, characteristics, and indicated uses of BruxZir-branded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer"; the commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods.
- Testimony of Dr. Michael DiTolla concerning creation of the BruxZir mark; advertising and promotion of the BruxZir mark and BruxZir-branded products; development, features, characteristics, and indicated uses of BruxZir-branded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; generic terms for full contour zirconia crowns; treatments for patients with bruxism; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer"; pronunciation of the terms "BruxZir" and "bruxer" by dental practitioners; the commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in

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selecting a particular brand of such goods. Expert testimony concerning distinctiveness (and nongenericness) of the BruxZir mark, including that the mark is suggestive; generic terms for full contour zirconia crowns; treatments for patients with bruxism.

- Testimony of Nicole Fallon concerning one or more instances of actual confusion.
- Testimony of Robin Bartolo concerning development, features, characteristics, and indicated uses of BruxZir-branded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; and operation of Glidewell's Authorized Labs program, Glidewell Direct, and Glidewell's interactions with Authorized BruxZir Labs.
- Testimony of Robin Carden concerning development, features, characteristics, and indicated uses of BruxZir-branded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; Glidewell's interactions with Authorized BruxZir Labs and operation of Glidewell's Authorized Labs program; and commercial strength of the BruxZir mark, including technical and educational presentations concerning BruxZir brand product.
- Testimony of Rudy Ramirez concerning creation of the BruxZir mark; development, features, characteristics, and indicated uses of BruxZir-branded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the commercial strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services.
  - Testimony of Keith Allred concerning Glidewell's ownership of the

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- BruxZir mark and Trademark Reg. No. 3,739,663, and Glidewell's enforcement of its rights in the BruxZir mark.
- Testimony of Glenn Sasaki concerning Glidewell's damages and Keating's profits.
- Testimony of Ronald Goldstein, D.D.S. concerning the validity (distinctiveness and nongenericness) of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, the degree of care typically used in selecting a particular brand of such goods, and the likelihood of confusion resulting from Keating's use of KDZ Bruxer; generic terms for full contour zirconia crowns; treatments for patients with bruxism
- Testimony of David Franklyn concerning the validity (distinctiveness and nongenericness) of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, the degree of care typically used in selecting a particular brand of such goods, and the likelihood of confusion resulting from Keating's use of KDZ Bruxer.
- Testimony of Gregory Doneff, D.D.S. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell

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Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."

- Testimony of Howard Cohen, D.D.S. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Spencer Luke, D.M.D. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Stuart Newman, D.D.S. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer"

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crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."

- Testimony of Thomas Bell, D.M.D. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Terence Michiels, D.D.S. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Kent Toca, D.D.S. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the

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type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."

- Testimony of Dr. Michael Fanning concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Dr. Vincent S. Cianciulli concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Dr. Ilya Benjamin concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity

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of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."

- Testimony of Dr. Dean Saiki concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Dr. Robert McNicholas concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."

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- Testimony of Dr. Benjamin An concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Dr. Oscar Goren concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Dr. Dennis A. Gaishauser concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell

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Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."

- Testimony of Dr. Dr. Chester A. Bizga concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Dr. Valentine Ferraris concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Dr. Paul Taylor concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer"

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crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."

- Testimony of Dr. Meredith S. Esposito concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Dr. John Griffith concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Scott Bigler concerning the validity and commercial strength of the BruxZir mark, and Glidewell Direct and Glidewell's interactions with Authorized BruxZir Labs.
  - Testimony of Glenn Yamamoto concerning the validity and

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commercial strength of the BruxZir mark, and Glidewell Direct and Glidewell's interactions with Authorized BruxZir Labs.

- Testimony of Jacob Trachsel concerning the validity and commercial strength of the BruxZir mark, and Glidewell Direct and Glidewell's interactions with Authorized BruxZir Labs.
- Testimony of Kareen Chamberlain concerning the validity and commercial strength of the BruxZir mark, and Glidewell Direct and Glidewell's interactions with Authorized BruxZir Labs.
- Testimony of Shaun Keating concerning or constituting admissions that the BruxZir mark is nongeneric; advertising and promotion of the BruxZir mark and BruxZir-branded products; development, features, characteristics, and indicated uses of BruxZir-branded products; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer"; the commercial strength of the BruxZir mark; the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks; the channels through which BruxZir and KDZ Bruxer brand goods are marketed; Keating's intent in selecting the KDZ Bruxer mark; the type of goods marketed under those marks; and the degree of care typically used in selecting a particular brand of such goods.
- Testimony of Robert Brandon concerning or constituting admissions that the BruxZir mark is nongeneric; advertising and promotion of the BruxZir mark and BruxZir-branded products; development, features, characteristics, and indicated uses of BruxZir-branded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of

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- confusion between the BruxZir mark and "KDZ Bruxer"; the commercial strength of the BruxZir mark; the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks; the channels through which BruxZir and KDZ Bruxer brand goods are marketed; Keating's intent in selecting the KDZ Bruxer mark; the type of goods marketed under those marks; and the degree of care typically used in selecting a particular brand of such goods.
- Testimony of Diane Donich concerning Keating's sales of and profits from sales of product under the KDZ Bruxer mark.
- Reports showing Keating marketing expenses and sales. (Exs. 515, 943-46)
- Documents showing Glidewell's expenses to promote and market the BruxZir mark and BruxZir-branded products. (E.g., Exs. 1550, 1564-68)
  - Reports showing Glidewell website statistics. (Exs. 1549, 1551-52)
- Reports showing unit sales and revenues of BruxZir brand product. (Exs. 599, 1531-32, 1560-61)
  - List of Authorized BruxZir Labs. (Ex. 10)
- Exemplars of the BruxZir and KDZ Bruxer marks as they appear in the marketplace. (Exs. 559, 615, 948, 1171, 1176, 1488-91)
- Call note report, and invoice and fax transmittal, regarding contact with Dr. Le's office. (Exs. 556-57)
- Keating prescription forms and lab notes. (Exs. 569, 1052, 1121, 1139, 1142, 1160)
  - Application for the BruxZir mark by Glidewell. (Ex. 608)
  - Documents showing examination of the BruxZir mark by the U.S.
- 25 Patent and Trademark Office. (Exs. 608, 1466, 1467)
  - Trademark Manual of Examining Procedure, 5<sup>th</sup> Ed. (excerpts). (Ex. 1562)
    - Registration of the BruxZir mark by the U.S. Patent and Trademark

GLIDEWELL'S MEMORANDUM OF CONTENTIONS OF FACT AND LAW - 41 -

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Glidewell's BruxZir trademark.							
Counterclaim 2: Glidewell's actions constitute unfair competition in							
violation of Cal. Bus. & Prof. Code § 17200 et seq.							
Counterclaim 3: Glidewell's actions constitute misuse of trademark.							
Counterclaim 4: Glidewell's Trademark Reg. No. 3,739,663 should be							

cancelled. First Affirmative Defense: Glidewell's trademark is invalid or unenforceable because it is a generic or descriptive term.

Second Affirmative Defense: There is no likelihood of confusion between Glidewell's BruxZir trademark and KDZ Bruxer.

Third Affirmative Defense: Glidewell is estopped from asserting that any rights that it may have in the trademark BruxZir are so broad as to cover or include competitors' use of the words Brux or Bruxer within those competitors' trademarks.

Fourth Affirmative Defense: Glidewell's attempts to enforce its BruxZir trademark constitute misuse of a trademark, unclean hands, and unfair competition.

Fifth Affirmative Defense: Keating's use of the terms "bruxer" and/or "bruxzir" constitutes fair use.

#### Elements Required to Establish Keating's Counterclaims and **B. Affirmative Defenses**

#### Keating's Counterclaim 1: Declaratory Judgment of Non-1. **Infringement**

- BruxZir is not a valid, protectable trademark; or a.
- b. Glidewell does not own the BruxZir trademark; or
- Keating's use of KDZ Bruxer, without Glidewell's c.

consent, is not likely to cause consumer confusion.

See Ninth Circuit Manual of Model Civil Jury Instructions No. 15.5; Rearden LLC v. Rearden Commerice, Inc., 683 F.3d 1190, 1202 (9th Cir. 2012); Brookfield Communications, Inc. v. West Coast Entertainment Corp., 174 F.3d 1036, 1046

(9<sup>th</sup> Cir. 1999).

#### 2. <u>Keating's Counterclaim 2: Unfair Competition in Violation</u> of Cal. Bus. & Prof. Code § 17200 et seq.

- a. Glidewell's actions constitute an unlawful, unfair or fraudulent business act or practice, or unfair, deceptive, untrue or misleading advertising; and
- b. Keating has suffered injury in fact and lost money or property as a result of the unfair competition.

See Cal. Bus. & Prof. Code §§ 17200, 17204.

### 3. Keating's Counterclaim 3: Glidewell's Actions Constitute Misuse of Trademark

a. This is not a proper claim for affirmative relief and elements to prove this claim do not exist.

See Juno Online Services v. Juno Lighting, Inc., 979 F.Supp. 684 (N.D. Ill. 1997); 6 J. Thomas McCarthy, McCarthy on Trademarks and Unfair Competition (4th ed. 2010) § 31:44.

# 4. Keating's Counterclaim 4: Glidewell's Federally Registered Trademark No. 3,739,663 Should be Cancelled

a. The registration for the BruxZir mark should be cancelled because the primary significance of the registered BruxZir mark to the relevant public is as the generic name for the goods or services for which it is registered.

See 15 U.S.C. § 1064(3); See Ninth Circuit Manual of Model Civil Jury Instructions Nos. 15.9.

b. The registration for the BruxZir mark should be cancelled because the BruxZir mark, if descriptive, has not attained secondary meaning (i.e., the primary significance of the BruxZir mark in the minds of the prospective consumers is to identify the product itself rather than to identify a single source, regardless of whether consumers know who or what the source is).

5.	<b>Keating's First Affirmative Defense: Glidewell's</b>
	Trademark is Invalid as it is Generic or Descriptive

See Ninth Circuit Manual of Model Civil Jury Instructions Nos. 15.10, 15.17.

a. The registered BruxZir mark is invalid because the primary significance of the registered BruxZir mark to the relevant public is as the generic name for the goods or services for which it is registered.

See 15 U.S.C. § 1064(3); See Ninth Circuit Manual of Model Civil Jury Instructions Nos. 15.9.

b. The registered BruxZir mark is invalid because the BruxZir mark, if descriptive, has not attained secondary meaning (i.e., the primary significance of the BruxZir mark in the minds of the prospective consumers is to identify the product itself rather than to identify a single source, regardless of whether consumers know who or what the source is).

See Ninth Circuit Manual of Model Civil Jury Instructions Nos. 15.10, 15.17.

### 6. <u>Keating's Second Affirmative Defense: No Likelihood of Confusion</u>

a. Keating's use of KDZ Bruxer, without Glidewell's consent, is not likely to cause consumer confusion.

See Ninth Circuit Manual of Model Civil Jury Instructions Nos. 15.5.

- 7. Keating's Third Affirmative Defense: Glidewell is estopped from asserting that any rights that it may have in the trademark BruxZir are so broad as to cover or include competitors' use of the words Brux or Bruxer within those competitors' trademarks
  - a. Glidewell must be apprised of the facts;
- b. Glidewell must intend that its conduct shall be acted upon, or must so act that Keating has a right to believe it was so intended;

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c. Keating must be ignorant of the true state of facts; and

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and

	d.	Keating	must rel	y upon th	ie condi	uct to l	nis in	jury	•
See Cox v.	Ocean	View Hote	el Corp	533 F.30	d 1114,	1123	(9th <b>(</b>	Cir.	2008).

# 8. <u>Keating's Fourth Affirmative Defense: Misuse of</u> <u>Trademark/Unclean Hands/Unfair Competition</u>

- a. Glidewell has violated conscience, good faith, or other equitable principles in its prior conduct, or has dirtied its hands in acquiring the right presently asserted;
- b. Glidewell's misconduct relates directly to the transaction concerning which the complaint is made.

See Dollar Systems, Inc. v. Avcar Leasing Systems, Inc., 890 F.2d 165, 173 (9th Cir. 1989); KEMA, Inc. v. Koperwhats, 658 F.Supp.2d 1022, 1035-36 (N.D. Cal. 2009) (defense of misuse of trademark is redundant with unclean hands).

#### 9. Keating's Fifth Affirmative Defense: Fair Use

- a. Keating used the mark other than to distinguish Keating's goods from Glidewell's and to indicate the source of Keating's goods;
  - b. Keating used the BruxZir mark fairly and in good faith;
- c. Keating used the BruxZir mark only to describe Keating's goods as those of Keating's and not at all to describe Glidewell's product.

See Ninth Circuit Manual of Model Civil Jury Instructions No. 15.22.

# C. Brief Description of Key Evidence in Opposition to Keating's Counterclaims and Affirmative Defenses

Plaintiff identifies at least the following key evidence in opposition to Keating's counterclaims and affirmative defenses. Plaintiff reserves the right to enlarge or otherwise modify this list.

# 1. <u>Keating's Counterclaim 1: Declaratory Judgment re Non-Infringement</u>

• Testimony of James Shuck concerning creation of the BruxZir mark;

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advertising and promotion of the BruxZir mark and BruxZir-branded products; development, features, characteristics, and indicated uses of BruxZir-branded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer"; the commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods.

• Testimony of Dr. Michael DiTolla concerning creation of the BruxZir mark; advertising and promotion of the BruxZir mark and BruxZir-branded products; development, features, characteristics, and indicated uses of BruxZirbranded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; generic terms for full contour zirconia crowns; treatments for patients with bruxism; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer"; pronunciation of the terms "BruxZir" and "bruxer" by dental practitioners; the commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods. Expert testimony concerning distinctiveness (and nongenericness) of the BruxZir mark, including that the mark is suggestive; generic terms for full contour zirconia crowns; treatments for patients with bruxism.

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- Testimony of Nicole Fallon concerning one or more instances of actual confusion.
- Testimony of Robin Bartolo concerning development, features, characteristics, and indicated uses of BruxZir-branded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; and operation of Glidewell's Authorized Labs program, Glidewell Direct, and Glidewell's interactions with Authorized BruxZir Labs.
- Testimony of Robin Carden concerning development, features, characteristics, and indicated uses of BruxZir-branded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; Glidewell's interactions with Authorized BruxZir Labs and operation of Glidewell's Authorized Labs program; and commercial strength of the BruxZir mark, including technical and educational presentations concerning BruxZir brand product.
- Testimony of Rudy Ramirez concerning creation of the BruxZir mark; development, features, characteristics, and indicated uses of BruxZir-branded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the commercial strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services.
- Testimony of Keith Allred concerning Glidewell's ownership of the BruxZir mark and Trademark Reg. No. 3,739,663, and Glidewell's enforcement of its rights in the BruxZir mark.
- Testimony of Glenn Sasaki concerning Glidewell's damages and Keating's profits.

- Testimony of Ronald Goldstein, D.D.S. concerning the validity (distinctiveness and nongenericness) of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, the degree of care typically used in selecting a particular brand of such goods, and the likelihood of confusion resulting from Keating's use of KDZ Bruxer; generic terms for full contour zirconia crowns; treatments for patients with bruxism
- Testimony of David Franklyn concerning the validity (distinctiveness and nongenericness) of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, the degree of care typically used in selecting a particular brand of such goods, and the likelihood of confusion resulting from Keating's use of KDZ Bruxer.
- Testimony of Gregory Doneff, D.D.S. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Howard Cohen, D.D.S. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the

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proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."

- Testimony of Spencer Luke, D.M.D. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Stuart Newman, D.D.S. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."

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- Testimony of Thomas Bell, D.M.D. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Terence Michiels, D.D.S. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Kent Toca, D.D.S. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell

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Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."

- Testimony of Dr. Michael Fanning concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Dr. Vincent S. Cianciulli concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Dr. Ilya Benjamin concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer"

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crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."

- Testimony of Dr. Dean Saiki concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Dr. Robert McNicholas concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Dr. Benjamin An concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of

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goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."

- Testimony of Dr. Oscar Goren concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Dr. Dennis A. Gaishauser concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Dr. Dr. Chester A. Bizga concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the

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proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."

- Testimony of Dr. Valentine Ferraris concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Dr. Paul Taylor concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."

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- Testimony of Dr. Meredith S. Esposito concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Dr. John Griffith concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Scott Bigler concerning the validity and commercial strength of the BruxZir mark, and Glidewell Direct and Glidewell's interactions with Authorized BruxZir Labs.
- Testimony of Glenn Yamamoto concerning the validity and commercial strength of the BruxZir mark, and Glidewell Direct and Glidewell's interactions with Authorized BruxZir Labs.
- Testimony of Jacob Trachsel concerning the validity and commercial strength of the BruxZir mark, and Glidewell Direct and Glidewell's interactions

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with Authorized BruxZir Labs.

- Testimony of Kareen Chamberlain concerning the validity and commercial strength of the BruxZir mark, and Glidewell Direct and Glidewell's interactions with Authorized BruxZir Labs.
- Testimony of Shaun Keating concerning or constituting admissions that the BruxZir mark is nongeneric; advertising and promotion of the BruxZir mark and BruxZir-branded products; development, features, characteristics, and indicated uses of BruxZir-branded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer"; the commercial strength of the BruxZir mark; the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks; the channels through which BruxZir and KDZ Bruxer brand goods are marketed; Keating's intent in selecting the KDZ Bruxer mark; the type of goods marketed under those marks; and the degree of care typically used in selecting a particular brand of such goods.
- Testimony of Robert Brandon concerning or constituting admissions that the BruxZir mark is nongeneric; advertising and promotion of the BruxZir mark and BruxZir-branded products; development, features, characteristics, and indicated uses of BruxZir-branded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer"; the commercial strength of the BruxZir mark; the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks; the channels through which BruxZir and KDZ Bruxer brand goods are marketed; Keating's intent in selecting the KDZ Bruxer mark; the type of

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- goods marketed under those marks; and the degree of care typically used in selecting a particular brand of such goods.
- Testimony of Diane Donich concerning Keating's sales of and profits from sales of product under the KDZ Bruxer mark.
- Reports showing Keating marketing expenses and sales. (Exs. 515, 943-46)
- Documents showing Glidewell's expenses to promote and market the BruxZir mark and BruxZir-branded products. (E.g., Exs. 1550, 1564-68)
  - Reports showing Glidewell website statistics. (Exs. 1549, 1551-52)
- Reports showing unit sales and revenues of BruxZir brand product. (Exs. 599, 1531-32, 1560-61)
  - List of Authorized BruxZir Labs. (Ex. 10)
- Exemplars of the BruxZir and KDZ Bruxer marks as they appear in the marketplace. (Exs. 559, 615, 948, 1171, 1176, 1488-91)
- Call note report, and invoice and fax transmittal, regarding contact with Dr. Le's office. (Exs. 556-57)
- Keating prescription forms and lab notes. (Exs. 569, 1052, 1121, 1139, 1142, 1160)
  - Application for the BruxZir mark by Glidewell. (Ex. 608)
  - Documents showing examination of the BruxZir mark by the U.S.
- 21 Patent and Trademark Office. (Exs. 608, 1466, 1467)
- Trademark Manual of Examining Procedure, 5<sup>th</sup> Ed. (excerpts). (Ex. 23 | 1562)
  - Registration of the BruxZir mark by the U.S. Patent and Trademark Office. (Ex. 607)
  - Documents showing that the BruxZir mark does not exist in a crowded field (E.g., Exs. 618, 619)
    - Dictionary excerpts. (E.g., Ex. 614)

- Advertising, marketing, and promotional material for the BruxZir mark and BruxZir-branded products. (E.g., Exs. 66-68, 562-568, 570, 575-576, 578-579, 610, 1055-1061)
- Documents evidencing third party recognition of the BruxZir mark. (E.g., Exs. 580-591, 594-598)
- Keating advertising and marketing material for KDZ Bruxer mark and BruxZir-branded products. (E.g., Exs. 570, 574)
- Third party advertising and marketing material for full contour zirconia crowns. (E.g., Exs. 560, 1452)
- Documents evidencing Glidewell's efforts to protect the BruxZir mark. (E.g., Exs. 141, 146-151)
- Documents evidencing Keating's first use of the KDZ Bruxer mark in the marketplace. (E.g., Ex. 1342)
- Documents evidencing that neither "bruxzir crown" nor "bruxer crown" were generic terms for full contour zirconia crowns prior to April 2011. (E.G., Ex. 2140)

### 2. <u>Keating's Counterclaim 2: Unfair Competition in Violation</u> of Cal. Bus. & Prof. Code § 17200 et seq.

- Testimony from Keith Allred regarding Glidewell's use of the ® symbol in connection with various product offerings; Glidewell's registration of the BruxZir mark; and Glidewell's enforcement of the BruxZir mark.
- Testimony from Robin Bartolo regarding communications with Keating regarding Keating's use of KDZ Bruxer; and the BruxZir Authorized Lab program.
- Testimony from Jim Shuck regarding Glidewell's marketing of products under the BruxZir brand.
- Emails between Glidewell and R-Dent Laboratories regarding enforcement of the "BruxZir" mark. (Ex. 600)

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- Emails between Authentic Dental Lab and Glidewell regarding enforcement of the "BruxZir" mark. (Ex. 601)
- Emails between Pittman Dental Laboratory and Glidewell regarding enforcement of the "BruxZir" mark. (Ex. 602)
- Emails between Assured Dental Lab and Glidewell regarding enforcement of the "BruxZir" mark. (Ex. 603)
- United States Trademark Registration for BruxZir, Registration No. 3,739,663 dated 01/19/10. (Ex. 607)
- File History for US Trademark Registration No. 3,739,663 for BruxZir (Class 10) various dates. (Ex. 608)
- Emails between Advanced Dental Laboratory and Glidewell regarding enforcement of the "BruxZir" mark. (Ex. 148)
- Emails between Dentopia Dental Lab and Glidwell regarding enforcement of the "BruxZir" mark. (Ex. 150)
- Emails between Showcase Dental Laboratories and Glidwell regarding enforcement of the "BruxZir" mark. (Ex. 147)
- Emails between Barth Dental Laboratory and Glidewell regarding enforcement of the "BruxZir" mark. (Ex. 151)
- Emails between China Dental Outsourcing and Glidewell regarding enforcement of the "BruxZir" mark. (Ex. 146)
- Emails between Fusion Dental Laboratory Solutions and Glidewell regarding enforcement of the "BruxZir" mark. (Ex. 141)
- Emails between Old Dominion and Glidewell regarding enforcement of the "BruxZir" mark. (Ex. 149)
  - 3. Keating's Counterclaim 3: Glidewell's Actions Constitute

    Misuse of Trademark
- Since this is not a proper claim for affirmative relief, it is not necessary to identify evidence to oppose this nonexistent claim.

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#### 4. **Keating's Counterclaim 4: Glidewell's Federally Registered** Trademark No. 3,739,663 Should be Cancelled

- Testimony of James Shuck concerning creation of the BruxZir mark; advertising and promotion of the BruxZir mark and BruxZir-branded products; development, features, characteristics, and indicated uses of BruxZir-branded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services.
- Testimony of Dr. Michael DiTolla concerning creation of the BruxZir mark; advertising and promotion of the BruxZir mark and BruxZir-branded products; development, features, characteristics, and indicated uses of BruxZirbranded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; generic terms for full contour zirconia crowns; treatments for patients with bruxism; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer"; pronunciation of the terms "BruxZir" and "bruxer" by dental practitioners. Expert testimony concerning distinctiveness (and nongenericness) of the BruxZir mark, including that the mark is suggestive; generic terms for full contour zirconia crowns; treatments for patients with bruxism.
- Testimony of Robin Bartolo concerning development, features, characteristics, and indicated uses of BruxZir-branded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; and operation of Glidewell's Authorized Labs program, Glidewell Direct, and Glidewell's interactions with Authorized BruxZir Labs.

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- Testimony of Robin Carden concerning development, features, characteristics, and indicated uses of BruxZir-branded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; Glidewell's interactions with Authorized BruxZir Labs and operation of Glidewell's Authorized Labs program; and commercial strength of the BruxZir mark, including technical and educational presentations concerning BruxZir brand product.
- Testimony of Rudy Ramirez concerning creation of the BruxZir mark; development, features, characteristics, and indicated uses of BruxZir-branded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the commercial strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services.
- Testimony of Keith Allred concerning Glidewell's ownership of the BruxZir mark and Trademark Reg. No. 3,739,663, and Glidewell's enforcement of its rights in the BruxZir mark.
- Testimony of Ronald Goldstein, D.D.S. concerning the validity (distinctiveness and nongenericness) of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark; generic terms for full contour zirconia crowns; treatments for patients with bruxism.
- Testimony of David Franklyn concerning the validity (distinctiveness and nongenericness) of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark.
- Testimony of Gregory Doneff, D.D.S. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark

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and its indication of Glidewell Laboratories as a source of goods and services.

- Testimony of Howard Cohen, D.D.S. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services.
- Testimony of Spencer Luke, D.M.D. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services.
- Testimony of Stuart Newman, D.D.S. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services.
- Testimony of Thomas Bell, D.M.D. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services.
- Testimony of Terence Michiels, D.D.S. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services.
  - Testimony of Kent Toca, D.D.S. concerning the validity of the

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BruxZir mark, the conceptual and commercial strength of the BruxZir mark; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services.

- Testimony of Dr. Michael Fanning concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services.
- Testimony of Dr. Vincent S. Cianciulli concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services.
- Testimony of Dr. Ilya Benjamin concerning the validity of the BruxZir mark; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services.
- Testimony of Dr. Dean Saiki concerning the validity of the BruxZir mark; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services.
- Testimony of Dr. Robert McNicholas concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark

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and its indication of Glidewell Laboratories as a source of goods and services.

- Testimony of Dr. Benjamin An concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services.
- Testimony of Dr. Oscar Goren concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services.
- Testimony of Dr. Dennis A. Gaishauser concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services.
- Testimony of Dr. Dr. Chester A. Bizga concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services.
- Testimony of Dr. Valentine Ferraris concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services.
- Testimony of Dr. Paul Taylor concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark; use of the

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terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services.

- Testimony of Dr. Meredith S. Esposito concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services.
- Testimony of Dr. John Griffith concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services.
- Testimony of Scott Bigler concerning the validity and commercial strength of the BruxZir mark, and Glidewell Direct and Glidewell's interactions with Authorized BruxZir Labs.
- Testimony of Glenn Yamamoto concerning the validity and commercial strength of the BruxZir mark, and Glidewell Direct and Glidewell's interactions with Authorized BruxZir Labs.
- Testimony of Jacob Trachsel concerning the validity and commercial strength of the BruxZir mark, and Glidewell Direct and Glidewell's interactions with Authorized BruxZir Labs.
- Testimony of Kareen Chamberlain concerning the validity and commercial strength of the BruxZir mark, and Glidewell Direct and Glidewell's interactions with Authorized BruxZir Labs.
- Testimony of Shaun Keating concerning or constituting admissions that the BruxZir mark is nongeneric.
  - Testimony of Bob Brandon concerning or constituting admissions that

• Documents evidencing third party recognition of the BruxZir mark. (E.g., Exs. 580-591, 594-598) GLIDEWELL'S MEMORANDUM OF CONTENTIONS OF FACT AND LAW

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- Keating advertising and marketing material for KDZ Bruxer mark and BruxZir-branded products. (E.g., Exs. 570, 574)
- Third party advertising and marketing material for full contour zirconia crowns. (E.g., Exs. 560, 1452)
- Documents evidencing Glidewell's efforts to protect the BruxZir mark. (E.g., Exs. 141, 146-151)
- Documents evidencing Keating's first use of the KDZ Bruxer mark in the marketplace. (E.g., Ex. 1342)
- Documents evidencing that neither "bruxzir crown" nor "bruxer crown" were generic terms for full contour zirconia crowns prior to April 2011. (E.g., Ex. 2140)

# 5. <u>Keating's First Affirmative Defense: Glidewell's</u> Trademark is Invalid as it is Generic or Descriptive

- Testimony of James Shuck concerning creation of the BruxZir mark; advertising and promotion of the BruxZir mark and BruxZir-branded products; development, features, characteristics, and indicated uses of BruxZir-branded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services.
- Testimony of Dr. Michael DiTolla concerning creation of the BruxZir mark; advertising and promotion of the BruxZir mark and BruxZir-branded products; development, features, characteristics, and indicated uses of BruxZir-branded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; generic terms for full contour zirconia crowns; treatments for patients with bruxism; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the

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BruxZir mark and "KDZ Bruxer"; pronunciation of the terms "BruxZir" and "bruxer" by dental practitioners. Expert testimony concerning distinctiveness (and nongenericness) of the BruxZir mark, including that the mark is suggestive; generic terms for full contour zirconia crowns; treatments for patients with bruxism.

- Testimony of Robin Bartolo concerning development, features, characteristics, and indicated uses of BruxZir-branded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; and operation of Glidewell's Authorized Labs program, Glidewell Direct, and Glidewell's interactions with Authorized BruxZir Labs.
- Testimony of Robin Carden concerning development, features, characteristics, and indicated uses of BruxZir-branded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; Glidewell's interactions with Authorized BruxZir Labs and operation of Glidewell's Authorized Labs program; and commercial strength of the BruxZir mark, including technical and educational presentations concerning BruxZir brand product.
- Testimony of Rudy Ramirez concerning creation of the BruxZir mark; development, features, characteristics, and indicated uses of BruxZir-branded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the commercial strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services.
- Testimony of Keith Allred concerning Glidewell's ownership of the BruxZir mark and Trademark Reg. No. 3,739,663, and Glidewell's enforcement of its rights in the BruxZir mark.

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- Testimony of Ronald Goldstein, D.D.S. concerning the validity (distinctiveness and nongenericness) of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark; generic terms for full contour zirconia crowns; treatments for patients with bruxism.
- Testimony of David Franklyn concerning the validity (distinctiveness and nongenericness) of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark.
- Testimony of Gregory Doneff, D.D.S. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services."
- Testimony of Howard Cohen, D.D.S. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services."
- Testimony of Spencer Luke, D.M.D. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services."
- Testimony of Stuart Newman, D.D.S. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services."
  - Testimony of Thomas Bell, D.M.D. concerning the validity of the

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BruxZir mark, the conceptual and commercial strength of the BruxZir mark; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services."

- Testimony of Terence Michiels, D.D.S. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services."
- Testimony of Kent Toca, D.D.S. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services."
- Testimony of Dr. Michael Fanning concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services."
- Testimony of Dr. Vincent S. Cianciulli concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services."
- Testimony of Dr. Ilya Benjamin concerning the validity of the BruxZir mark; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the

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BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services."

- Testimony of Dr. Dean Saiki concerning the validity of the BruxZir mark; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services."
- Testimony of Dr. Robert McNicholas concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services."
- Testimony of Dr. Benjamin An concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services."
- Testimony of Dr. Oscar Goren concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services."
- Testimony of Dr. Dennis A. Gaishauser concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services."
  - Testimony of Dr. Dr. Chester A. Bizga concerning the validity of the

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BruxZir mark, the conceptual and commercial strength of the BruxZir mark; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services."

- Testimony of Dr. Valentine Ferraris concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services."
- Testimony of Dr. Paul Taylor concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services."
- Testimony of Dr. Meredith S. Esposito concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services."
- Testimony of Dr. John Griffith concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services."
- Testimony of Scott Bigler concerning the validity and commercial strength of the BruxZir mark, and Glidewell Direct and Glidewell's interactions with Authorized BruxZir Labs.
  - Testimony of Glenn Yamamoto concerning the validity and

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- commercial strength of the BruxZir mark, and Glidewell Direct and Glidewell's interactions with Authorized BruxZir Labs.
- Testimony of Jacob Trachsel concerning the validity and commercial strength of the BruxZir mark, and Glidewell Direct and Glidewell's interactions with Authorized BruxZir Labs.
- Testimony of Kareen Chamberlain concerning the validity and commercial strength of the BruxZir mark, and Glidewell Direct and Glidewell's interactions with Authorized BruxZir Labs.
- Testimony of Shaun Keating concerning or constituting admissions that the BruxZir mark is nongeneric.
- Testimony of Bob Brandon concerning or constituting admissions that the BruxZir mark is nongeneric.
- Reports showing Keating marketing expenses and sales. (Exs. 515, 943-46)
- Documents showing Glidewell's expenses to promote and market the BruxZir mark and BruxZir-branded products. (E.g., Exs. 1550, 1564-68)
  - Reports showing Glidewell website statistics. (Exs. 1549, 1551-52)
- Reports showing unit sales and revenues of BruxZir brand product. (Exs. 599, 1531-32, 1560-61)
  - List of Authorized BruxZir Labs. (Ex. 10)
- Exemplars of the BruxZir and KDZ Bruxer marks as they appear in the marketplace. (Exs. 559, 615, 948, 1171, 1176, 1488-91)
- Keating prescription forms and lab notes. (Exs. 569, 1052, 1121, 1139, 1142, 1160)
  - Application for the BruxZir mark by Glidewell. (Ex. 608)
  - Documents showing examination of the BruxZir mark by the U.S.
- Patent and Trademark Office. (Exs. 608, 1466, 1467)
  - Trademark Manual of Examining Procedure, 5<sup>th</sup> Ed. (excerpts). (Ex.

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## 6. Keating's Second Affirmative Defense: No Likelihood of Confusion

• Testimony of James Shuck concerning creation of the BruxZir mark; advertising and promotion of the BruxZir mark and BruxZir-branded products; development, features, characteristics, and indicated uses of BruxZir-branded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts

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indicating non-genericness of the BruxZir mark; facts indicating the strength of the
BruxZir mark and its indication of Glidewell Laboratories as a source of goods and
services; facts relating to likelihood of confusion between the BruxZir mark and
"KDZ Bruxer"; the commercial strength of the BruxZir mark, the proximity of the
goods marketed under the BruxZir and KDZ Bruxer marks, the channels through
which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods
marketed under those marks, and the degree of care typically used in selecting a
particular brand of such goods.

- Testimony of Dr. Michael DiTolla concerning creation of the BruxZir mark; advertising and promotion of the BruxZir mark and BruxZir-branded products; development, features, characteristics, and indicated uses of BruxZirbranded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; generic terms for full contour zirconia crowns; treatments for patients with bruxism; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer"; pronunciation of the terms "BruxZir" and "bruxer" by dental practitioners; the commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods. Expert testimony concerning distinctiveness (and nongenericness) of the BruxZir mark, including that the mark is suggestive; generic terms for full contour zirconia crowns; treatments for patients with bruxism.
- Testimony of Nicole Fallon concerning one or more instances of actual confusion.
  - Testimony of Robin Bartolo concerning development, features,

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characteristics, and indicated uses of BruxZir-branded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; and operation of Glidewell's Authorized Labs program, Glidewell Direct, and Glidewell's interactions with Authorized BruxZir Labs.

- Testimony of Robin Carden concerning development, features, characteristics, and indicated uses of BruxZir-branded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating nongenericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; Glidewell's interactions with Authorized BruxZir Labs and operation of Glidewell's Authorized Labs program; and commercial strength of the BruxZir mark, including technical and educational presentations concerning BruxZir brand product.
- Testimony of Rudy Ramirez concerning creation of the BruxZir mark; development, features, characteristics, and indicated uses of BruxZir-branded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the commercial strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services.
- Testimony of Keith Allred concerning Glidewell's ownership of the BruxZir mark and Trademark Reg. No. 3,739,663, and Glidewell's enforcement of its rights in the BruxZir mark.
- Testimony of Glenn Sasaki concerning Glidewell's damages and Keating's profits.
- Testimony of Ronald Goldstein, D.D.S. concerning the validity (distinctiveness and nongenericness) of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed

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under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, the degree of care typically used in selecting a particular brand of such goods, and the likelihood of confusion resulting from Keating's use of KDZ Bruxer; generic terms for full contour zirconia crowns; treatments for patients with bruxism

- Testimony of David Franklyn concerning the validity (distinctiveness and nongenericness) of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, the degree of care typically used in selecting a particular brand of such goods, and the likelihood of confusion resulting from Keating's use of KDZ Bruxer.
- Testimony of Gregory Doneff, D.D.S. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Howard Cohen, D.D.S. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in

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selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."

- Testimony of Spencer Luke, D.M.D. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Stuart Newman, D.D.S. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Thomas Bell, D.M.D. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the

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channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."

- Testimony of Terence Michiels, D.D.S. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Kent Toca, D.D.S. concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
  - Testimony of Dr. Michael Fanning concerning the validity of the

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BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."

- Testimony of Dr. Vincent S. Cianciulli concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Dr. Ilya Benjamin concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of

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confusion between the BruxZir mark and "KDZ Bruxer."

- Testimony of Dr. Dean Saiki concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Dr. Robert McNicholas concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Dr. Benjamin An concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark;

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facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."

- Testimony of Dr. Oscar Goren concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Dr. Dennis A. Gaishauser concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Dr. Dr. Chester A. Bizga concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in

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selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."

- Testimony of Dr. Valentine Ferraris concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Dr. Paul Taylor concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer" crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Dr. Meredith S. Esposito concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the

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channels through which BruxZir and KDZ Bruxer brand goods are marketed, the
type of goods marketed under those marks, and the degree of care typically used in
selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer
crown" in the dental industry; facts indicating non-genericness of the BruxZir mark
facts indicating the strength of the BruxZir mark and its indication of Glidewell
Laboratories as a source of goods and services; facts relating to likelihood of
confusion between the BruxZir mark and "KDZ Bruxer."

- Testimony of Dr. John Griffith concerning the validity of the BruxZir mark, the conceptual and commercial strength of the BruxZir mark, the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks, the channels through which BruxZir and KDZ Bruxer brand goods are marketed, the type of goods marketed under those marks, and the degree of care typically used in selecting a particular brand of such goods; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer."
- Testimony of Scott Bigler concerning the validity and commercial strength of the BruxZir mark, and Glidewell Direct and Glidewell's interactions with Authorized BruxZir Labs.
- Testimony of Glenn Yamamoto concerning the validity and commercial strength of the BruxZir mark, and Glidewell Direct and Glidewell's interactions with Authorized BruxZir Labs.
- Testimony of Jacob Trachsel concerning the validity and commercial strength of the BruxZir mark, and Glidewell Direct and Glidewell's interactions with Authorized BruxZir Labs.
- Testimony of Kareen Chamberlain concerning the validity and commercial strength of the BruxZir mark, and Glidewell Direct and Glidewell's

- Testimony of Shaun Keating concerning or constituting admissions that the BruxZir mark is nongeneric; advertising and promotion of the BruxZir mark and BruxZir-branded products; development, features, characteristics, and indicated uses of BruxZir-branded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer"; the commercial strength of the BruxZir mark; the proximity of the goods marketed under the BruxZir and KDZ Bruxer brand goods are marketed; Keating's intent in selecting the KDZ Bruxer mark; the type of goods marketed under those marks; and the degree of care typically used in selecting a particular brand of such goods.
- Testimony of Robert Brandon concerning or constituting admissions that the BruxZir mark is nongeneric; advertising and promotion of the BruxZir mark and BruxZir-branded products; development, features, characteristics, and indicated uses of BruxZir-branded products; use of the terms "bruxer" and "bruxer crown" in the dental industry; facts indicating non-genericness of the BruxZir mark; facts indicating the strength of the BruxZir mark and its indication of Glidewell Laboratories as a source of goods and services; facts relating to likelihood of confusion between the BruxZir mark and "KDZ Bruxer"; the commercial strength of the BruxZir mark; the proximity of the goods marketed under the BruxZir and KDZ Bruxer marks; the channels through which BruxZir and KDZ Bruxer brand goods are marketed; Keating's intent in selecting the KDZ Bruxer mark; the type of goods marketed under those marks; and the degree of care typically used in selecting a particular brand of such goods.
  - Testimony of Diane Donich concerning Keating's sales of and profits

GLIDEWELL'S MEMORANDUM OF CONTENTIONS OF FACT AND LAW

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578-579, 610, 1055-1061)

mark and BruxZir-branded products. (E.g., Exs. 66-68, 562-568, 570, 575-576,

- Documents evidencing third party recognition of the BruxZir mark. (E.g., Exs. 580-591, 594-598)
- Keating advertising and marketing material for KDZ Bruxer mark and BruxZir-branded products. (E.g., Exs. 570, 574)
- Third party advertising and marketing material for full contour zirconia crowns. (E.g., Exs. 560, 1452)
- Documents evidencing Glidewell's efforts to protect the BruxZir mark. (E.g., Exs. 141, 146-151)
- Documents evidencing Keating's first use of the KDZ Bruxer mark in the marketplace. (E.g., Ex. 1342)
- Documents evidencing that neither "bruxzir crown" nor "bruxer crown" were generic terms for full contour zirconia crowns prior to April 2011. (E.G., Ex. 2140)
  - 7. Keating's Third Affirmative Defense: Glidewell is estopped from asserting that any rights that it may have in the trademark BruxZir are so broad as to cover or include competitors' use of the words Brux or Bruxer within those competitors' trademarks
- Testimony from Keith Allred regarding Glidewell's use of the ® symbol in connection with various product offerings; Glidewell's registration of the BruxZir mark; and Glidewell's enforcement of the BruxZir mark.
- Testimony from Robin Bartolo regarding communications with Keating regarding Keating's use of KDZ Bruxer; and the BruxZir Authorized Lab program.
- Testimony from Jim Shuck regarding Glidewell's marketing of products under the BruxZir brand.
- Emails between Glidewell and R-Dent Laboratories regarding enforcement of the "BruxZir" mark. (Ex. 600)

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- Emails between Authentic Dental Lab and Glidewell regarding enforcement of the "BruxZir" mark. (Ex. 601)
- Emails between Pittman Dental Laboratory and Glidewell regarding enforcement of the "BruxZir" mark. (Ex. 602)
- Emails between Assured Dental Lab and Glidewell regarding enforcement of the "BruxZir" mark. (Ex. 603)
- Letter from Glidewell to Keating regarding use of BruxZir trademark.
  (Ex. 29)
- United States Trademark Registration for BruxZir, Registration No. 3,739,663 dated 01/19/10. (Ex. 607)
- File History for US Trademark Registration No. 3,739,663 for BruxZir (Class 10) various dates. (Ex. 608)
- Emails between Advanced Dental Laboratory and Glidewell regarding enforcement of the "BruxZir" mark. (Ex. 148)
- Emails between Dentopia Dental Lab and Glidwell regarding enforcement of the "BruxZir" mark. (Ex. 150)
- Emails between Showcase Dental Laboratories and Glidwell regarding enforcement of the "BruxZir" mark. (Ex. 147)
- Emails between Barth Dental Laboratory and Glidewell regarding enforcement of the "BruxZir" mark. (Ex. 151)
- Emails between China Dental Outsourcing and Glidewell regarding enforcement of the "BruxZir" mark. (Ex. 146)
- Emails between Fusion Dental Laboratory Solutions and Glidewell regarding enforcement of the "BruxZir" mark. (Ex. 141)
- Emails between Old Dominion and Glidewell regarding enforcement of the "BruxZir" mark. (Ex. 149)

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# 8. <u>Keating's Fourth Affirmative Defense: Misuse of</u> <u>Trademark/Unclean Hands/Unfair Competition</u>

- Testimony from Keith Allred regarding Glidewell's use of the ® symbol in connection with various product offerings; Glidewell's registration of the BruxZir mark; and Glidewell's enforcement of the BruxZir mark.
- Testimony from Robin Bartolo regarding communications with Keating regarding Keating's use of KDZ Bruxer; and the BruxZir Authorized Lab program.
- Testimony from Jim Shuck regarding Glidewell's marketing of products under the BruxZir brand.
- Emails between Glidewell and R-Dent Laboratories regarding enforcement of the "BruxZir" mark. (Ex. 600)
- Emails between Authentic Dental Lab and Glidewell regarding enforcement of the "BruxZir" mark. (Ex. 601)
- Emails between Pittman Dental Laboratory and Glidewell regarding enforcement of the "BruxZir" mark. (Ex. 602)
- Emails between Assured Dental Lab and Glidewell regarding enforcement of the "BruxZir" mark. (Ex. 603)
- United States Trademark Registration for BruxZir, Registration No. 3,739,663 dated 01/19/10. (Ex. 607)
- File History for US Trademark Registration No. 3,739,663 for BruxZir (Class 10) various dates. (Ex. 608)
- Emails between Advanced Dental Laboratory and Glidewell regarding enforcement of the "BruxZir" mark. (Ex. 148)
- Emails between Dentopia Dental Lab and Glidwell regarding enforcement of the "BruxZir" mark. (Ex. 150)
- Emails between Showcase Dental Laboratories and Glidwell regarding enforcement of the "BruxZir" mark. (Ex. 147)

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- Emails between Barth Dental Laboratory and Glidewell regarding enforcement of the "BruxZir" mark. (Ex. 151)
- Emails between China Dental Outsourcing and Glidewell regarding enforcement of the "BruxZir" mark. (Ex. 146)
- Emails between Fusion Dental Laboratory Solutions and Glidewell regarding enforcement of the "BruxZir" mark. (Ex. 141)
- Emails between Old Dominion and Glidewell regarding enforcement of the "BruxZir" mark. (Ex. 149)

#### 9. Keating's Fifth Affirmative Defense: Fair Use.

- Testimony of Keith Allred regarding Glidewell's registration of the "BruxZir" mark.
- Testimony of Robin Bartolo regarding the BruxZir Authorized Lab program.
- Testimony of David Franklyn concerning Keating's use of KDZ Bruxer as a trademark rather than solely to describe its goods.
- Testimony from Shaun Keating regarding Keating's use of KDZ Bruxer as a trademark; Keating's efforts to register KDZ Bruxer as a trademark.
- Testimony of Robert Brandon regarding Keating's use of KDZ Bruxer as a trademark; Keating's efforts to register KDZ Bruxer as a trademark.
- U.S. Patent and Trademark Office file history of Registration No. 85/287,029 for KDZ Bruxer. (Ex. 2063)
- Keating Dental Arts, Inc. Second Amended Answer, Affirmative Defenses, and Counterclaims: Demand for Jury Trial dated 10/26/12. (Ex. 1342)
- Documentary evidence and testimony concerning Keating's use of the term KDZ Bruxer, including on its website and in advertising

### III. EVIDENTIARY ISSUES.

Glidewell expects the following evidentiary issues will arise by motion *in limine*.

#### **Plaintiff's Motions in Limine:**

Motion in Limine No. 1: Motion to exclude evidence or argument regarding the purported generic use of BruxZir or bruxer for full contour zirconia crowns after April 2011. The date for determining genericness is the date that Keating entered the market—in this case, April of 2011. *Yellow Cab Co. of Sacramento v. Yellow Cab of Elk Grove, Inc.*, 419 F.3d 925, 928 (9th Cir. 2005). Usages after that date are irrelevant and should be excluded pursuant to Rules 402 and 403 of the Federal Rules of Evidence.

Motion in Limine No. 2: Motion to exclude evidence or argument regarding webpages from a source other than the parties and Authorized BruxZir Labs, on the grounds that they are not properly authenticated and constitute inadmissible hearsay. To properly authenticate a website, a person with personal knowledge of the contents of the website must testify. *In re Homestore.com, Inc. Sec. Litig.*, 347 F. Supp. 2d 769, 782-83 (C.D. Cal. 2004). Keating's witnesses cannot such testimony, and thus the websites should be excluded. Further, the websites contain hearsay and do not fall within the scope of any exception, and so should be excluded on that ground as wel. *See United States v. Jackson*, 208 F.3d 633, 637 (7th Cir. 2000).

Motion in Limine No. 3: Motion to exclude to exclude testimony from Keating's expert Dr. David Eggelston as his opinions on issues relating to genericness do not need meet the requirements of Federal Rule of Evidence 702, and to exclude Eggelston from offering new opinions on issues relating to likelihood of confusion. By this motion, Glidewell seeks an order precluding Keating from introducing testimony from Dr. Eggleston that the terms "Bruxzir" or "bruxer" are generic terms for all zirconia dental crowns, on the grounds that Dr. Eggleston's testimony is neither relevant nor reliable under Federal Rule of Evidence 702 and *Daubert v. Merrell Dow Pharmaceuticals, Inc.*, 509 U.S. 579 (1993). Dr. Eggleston does not opine as to whether the terms "Bruxzir" or "bruxer"

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were generic terms in the dental industry for all zirconia crowns as of April 2011 –
the crucial date for determining genericness. Yellow Cab Co. of Sacramento v.
Yellow Cab of Elk Grove, Inc., 419 F.3d 925, 928 (9th Cir. 2005). Nor could he.
The vast majority of the materials that he relies upon are unreliable, unauthenticated
hearsay websites that are either post-dated April 2011 or are undated. Fed. R. Evid.
702 (expert opinion must be reliable and be based on "sufficient facts or data").

**Motion in Limine No. 4:** Motion to exclude testimony from Keating's expert Lori Boatright as her opinions on issues relating to genericness do not need meet the requirements of Federal Rule of Evidence 702, and to exclude Boatright from offering new opinions on issues relating to likelihood of confusion. By this motion, Glidewell seeks an order precluding Keating from introducing testimony from Boatright that the terms "Bruxzir" or "bruxer" are generic terms for all zirconia dental crowns, on the grounds that Ms. Boatright's testimony is neither relevant nor reliable under Federal Rule of Evidence 702 and Daubert v. Merrell Dow Pharmaceuticals, Inc., 509 U.S. 579 (1993). Ms. Boatright does not opine as to whether the terms "Bruxzir" or "bruxer" were generic terms in the dental industry for all zirconia crowns as of April 2011 – the crucial date for determining genericness. Yellow Cab Co. of Sacramento v. Yellow Cab of Elk Grove, Inc., 419 F.3d 925, 928 (9th Cir. 2005). Her opinion also constitutes impermissible legal conclusions and should be excluded as a consequence. *Nationwide Transp. Fin. v.* Cass Info. Sys., 523 F.3d 1051, 1059-60 (9th Cir.2008).

**Motion in Limine No. 5:** Motion to exclude any evidence or argument regarding Keating's petition to cancel the BruxZir registration and its opposition to Glidewell's application to register BruxZir for the Glidewell milling blanks, on the ground that these proceedings are irrelevant to the claims or defenses of the parties and are likely to confuse the issues, mislead the jury and waste time. Fed. R. Evid. 402, 403.

**Motion in Limine No. 6:** Motion to exclude evidence or argument

regarding any purported consultation with counsel, or the content of any advice of
counsel that Keating may have received, regarding its use of the name "KDZ
Bruxer." Keating has failed to waive the attorney client privilege or to disclose the
content of such advice of counsel. The probative value of any such evidence or
argument is substantially outweighed by the danger of unfair prejudice to Glidewell
and/or misleading the jury. Fed. R. Evid. 403; Fed. R. Civ. P. 37.

Motion in Limine No. 7: Motion to exclude testimony or argument that Keating is purportedly being bullied by Glidewell or otherwise attempting to excite sympathy based on Keating's relative size. Such argument has no relevance to any claim or defense of the parties. Fed. R. Evid. 402. Even if the Court were to find such argument relevant, its probative value is substantially outweighed by unfair prejudice to Glidewell because it has an undue tendency to suggest a decision based on an improper, emotional basis. Fed. R. Evid. 403.

Motion in Limine No. 8: Motion to exclude testimony or argument that Glidewell is trying to destroy competition in the market for dental crowns and bridges. Such argument has no relevance to any legally cognizable claim or defense of the parties. Fed. R. Evid. 402. Moreover, even if the Court finds such argument relevant, its probative value is substantially outweighed by unfair prejudice to Glidewell. Fed. R. Evid. 403.

Motion in Limine No. 9: Motion to exclude any evidence or argument relating solely to any counterclaims or affirmative defenses that Keating or the Court may dismiss prior to trial. Any evidence or argument relating solely to such dismissed counterclaims or affirmative defenses is irrelevant to the remaining issues in this action and will only serve to confuse the jury, unnecessarily prolong the trial, and prejudice Glidewell. Fed. R. Evid. 402, 403.

Motion in Limine No. 10: Motion to exclude evidence or argument regarding any statements or rulings by the Court on any party's motions, including summary judgment motions, on the ground that such matters are irrelevant to the

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claims or defenses of the parties and are likely to confuse the issues, mislead the jury and waste time. Fed. R. Evid. 402, 403.

**Motion in Limine No. 11:** Motion to exclude evidence or argument regarding any offers to compromise. Fed. R. Evid. 408.

**Motion in Limine No. 12:** Motion to exclude any evidence or argument regarding allegations of illegal conduct by Glidewell unrelated to this action, on the ground that such matters are irrelevant to the claims or defenses of the parties and are likely to induce unfair prejudice against Glidewell, confuse the issues, mislead the jury and waste time. Fed. R. Evid. 402, 403.

#### **Defendant's Motions in Limine:**

**Motion in Limine No. 1:** Motion to exclude any testimony from plaintiff's expert Dr. Ronald Goldstein on the grounds that he was not timely disclosed and he proffers an improper legal opinion. Glidewell will oppose this motion.

First, Dr. Goldstein should not be excluded because he was timely disclosed as an expert on October 29, 2012 (the last day to disclose experts) and Keating has not been prejudiced by his disclosure on this date. *See Roe v. Nevada*, 621 F. Supp. 2d 1039, 1060 (D. Nev. 2007); *Cyntegra, Inc. v. Idexx Laboratories, Inc.*, CV06-4170PSG(CTX), 2007 WL 5193736 (C.D. Cal. Sept. 21, 2007) *aff'd, Cyntegra, Inc. v. IDEXX Laboratories, Inc.*, 322 F. App'x 569 (9th Cir. 2009). In addition, Glidewell offered to make Dr. Goldstein available for deposition following the discovery cutoff; Keating refused.

Second, as set forth in Glidewell's Response to Keating's Objections to Evidence Submitted by Glidewell's Expert Dr. Ronald Goldstein in Support of Its Motions for Partial Summary Judgment [Dkt. 153], Dr. Goldstein's testimony is proper. For his opinions, Dr. Goldstein properly relies on, among other things, his personal knowledge and his experience in the dental field. Fed. R. Evid. 703; See United States v. Hankey, 203 F.3d 1160, 1169 (9th Cir. 2000)(reliability based on

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training, experience, and personal knowledge). Dr. Goldstein also properly relies on statements from dentists to elucidate the bases for his opinions. Fed. R. Evid. 801(c); United States v. Kirk, 844 F.2d 660, 663 (9th Cir. 1988).

**Motion in Limine No. 2:** Motion to exclude any testimony from plaintiff's expert David Franklyn on the grounds that his rebuttal opinions were untimely, his opinions improperly rely on hearsay, and his opinions are not useful. Glidewell will oppose this motion.

First, Franklyn should not be excluded because his rebuttal opinions were timely disclosed on October 29, 2012 (the last day to disclose experts) and Keating has not been prejudiced by his disclosure on this date. See Roe v. Nevada, 621 F. Supp. 2d 1039, 1060 (D. Nev. 2007); Cyntegra, Inc. v. Idexx Laboratories, Inc., CV06-4170PSG(CTX), 2007 WL 5193736 (C.D. Cal. Sept. 21, 2007) aff'd, Cyntegra, Inc. v. IDEXX Laboratories, Inc., 322 F. App'x 569 (9th Cir. 2009). In addition, Glidewell offered to make Franklyn available for further deposition regarding these reports following the discovery cutoff; Keating refused.

Second, Franklyn's testimony does not improperly rely on hearsay. To the contrary, Franklyn relies in part on interviews conducted with dentists to provide relevant evidence that underlies his opinions regarding the strength of the BruxZir mark and the risk of consumer confusion. Such anecdotal evidence is routinely evaluated in considering both genericness and infringement. See e.g., Hutchinson v. Essence Communications, Inc., 769 F. Supp. 541, 554 (S.D.N.Y. 1991); Fancaster, Inc. v. Comcast Corp., 832 F. Supp. 2d 380, 419-20 (D.N.J. 2011).

Third, Franklyn's opinions concerning genericness of the BruxZir mark, the strength of the BruxZir mark and the risk of consumer confusion constitute proper legal opinions. Engaging experts (usually attorneys) to proffer opinion testimony concerning such matters as the strength of a mark, similarity between marks, the potential for customer confusion, and other specialized issues pertinent to a trademark case is a commonly accepted practice. See, e.g., Vail Assoc., Inc. v.

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Vend-Tel-Co., Ltd., 516 F.3d 853, 861-63, (10th Cir. 2008); B & B Hardware, Inc. v. Hargis Industries, Inc., 252 F.3d 1010, 1012 (8th Cir. 2001).

**Motion in Limine No. 3:** Motion to exclude testimony Glidewell employee Nicole Fallon as untimely disclosed and inconsistent with that which was timely disclosed during discovery. Glidewell will oppose the motion. Glidewell disclosed Ms. Fallon's identity and the subject matter of her knowledge in interrogatory responses, which is adequate disclosure as a matter of law. See Coleman v. Keebler Co., 997 F. Supp. 1102, 1107 (N.D. Ind. 1998).

**Motion in Limine No. 4:** Motion to exclude testimony from Glidewell employees James Shuck, Robin Bartolo, and Robin Carden to the extent their testimony is improper hearsay. Glidewell will oppose this motion. This motion constitutes nothing more than a request for an advisory opinion, and should therefore be denied. The Court may address any objections that Keating may choose to make to the specific testimony of these witnesses at trial.

**Motion in Limine No. 5:** Motion to exclude testimony from Glidewell's "dentist witnesses" on the ground that the witnesses were untimely disclosed. Glidewell will oppose this motion. As Glidewell understands it, Keating's motion is directed to the anticipated testimony of [list the dentists that we disclosed in our First Amended Disclosures]. These witnesses were disclosed in Glidewell's First Amended Disclosures, which were served on October 29, 2012. The disclosure was within the discovery period and was, therefore, timely. In addition, Keating has not been prejudiced by the timing of disclosure of these witnesses; therefore, exclusion would be improper. See Roe v. Nevada, 621 F. Supp. 2d 1039, 1060 (D. Nev. 2007); Cyntegra, Inc. v. Idexx Laboratories, Inc., CV06-4170PSG(CTX), 2007 WL 5193736 (C.D. Cal. Sept. 21, 2007) aff'd, Cyntegra, Inc. v. IDEXX Laboratories, *Inc.*, 322 F. App'x 569 (9th Cir. 2009).

**Motion in Limine No. 6:** Motion to exclude Glidewell from relying on Exhibit 15 filed in support of Glidewell's motions for partial summary judgment as

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evidence of actual confusion, on the ground that it constitutes hearsay. Glidewell								
will oppose this motion. This summary judgment exhibit (and its analogues on the								
Joint Exhibit List) contains two categories of evidence. The first, consisting of call								
log notes created by Keating employees and produced by Keating, are not hearsay								
pursuant to Rule 801(d)(2) of the Federal Rules of Evidence. The second,								
consisting of prescription forms completed by dentists (or their assistants) and								
submitted to Keating, all of which were produced by Keating, either do not								
constitute hearsay because they are not offered for the truth of the matter asserted,								
or because they fall within the state of mind or business records exceptions to the								
hearsay rule. Fed. R. Evid. 803(3), (6); Lahoti v. Vericheck, Inc., 636 F.3d 501, 509								
(9th Cir. 2011).								

**Motion in Limine No. 7:** Motion to exclude reference to Shaun Keating's previous employment with Glidewell, including accusations of his sexual harassment and reason for his termination. Glidewell will oppose this motion. Glidewell will provide the bases for its opposition after Keating has explained the basis for its motion.

**Motion in Limine No. 8:** Motion to exclude any reference to the fact that Robert Brandon was terminated from Glidewell. Glidewell will oppose this motion. Glidewell will provide the bases for its opposition after Keating has explained the basis for its motion.

Motion in Limine No. 9: Motion to exclude Internet pages submitted with Declaration of Deborah Mallgrave with Glidewell's reply in support of its motions for partial summary judgment. Glidewell will oppose this motion. As best Glidewell understands Keating's argument, it is that these pages were produced after the close of discovery. However, Glidewell has a duty under Rule 26(e) of the Federal Rules of Civil Procedure to supplement its disclosures, and Keating cannot demonstrate that it was prejudiced by this disclosure

#### IV. <u>IDENTIFICATION OF LEGAL ISSUES</u>

Based on issues known to date, Glidewell expects the following issues of law will arise:

- 1. Whether Keating's Third Counterclaim for Misuse of Trademark states a legally cognizable claim. Glidewell's position, as detailed in Glidewell's Motion for Partial Summary Judgment re Trademark Misuse, Unfair Competition, Unclean Hands, Fair Use, and Estoppel [Dkt. #79-1], is that misuse of trademark is not a legally cognizable claim. *See*, *e.g.*, *Juno Online Services v. Juno Lighting*, *Inc.*, 979 F.Supp. 684 (N.D. Ill. 1997); 6 J. Thomas McCarthy, McCarthy on Trademarks and Unfair Competition (4th ed. 2010) § 31:44.
- 2. Whether Glidewell's registered BruxZir trademark is entitled to a presumption of secondary meaning. Glidewell's position, as detailed in Glidewell's Reply in Support of its Motion for Partial Summary Judgment as to Keating's Invalidity Defense and Counterclaim [Dkt. #183], is that Glidewell's registered BruxZir trademark is entitled to a presumption of secondary meaning by virtue of its registration. *See Americana Trading Inc. v. Russ Berrie & Co.*, 966 F.2d 1284, 1287 (9th Cir. 1992) ("[R]egistration carries a presumption of secondary meaning. [Defendant] therefore had the burden to prove that secondary meaning had not attached if it wished to argue that [plaintiff's] mark was weak."); see also Avery Dennison Corp. v. Sumpton, 189 F.3d 868, 876 (9th Cir.1999); Conversive, Inc. v. Conversagent, Inc., 433 F. Supp. 2d 1079, 1088 (C.D. Cal. 2006); Ninth Cir. Model Jury Instr. 15.10, cmt. (incorporating Americana Trading in a model instruction "approved 11/2010," after Zobmondo).

### V. <u>BIFURCATION OF ISSUES</u>

None.

#### VI. JURY TRIAL

Glidewell timely demanded a jury trial on all jury claims.

The following issues are triable to the jury:

- Glidewell's claim and Keating's counterclaim and defenses regarding infringement of Glidewell's federally registered Trademark Reg. No. 3,739,663 in violation of section 32(a) of the Lanham Act, § 1114. *See Dairy Queen, Inc. v. Wood*, 369 U.S. 469, 477 (1962).
- Glidewell's claim and Keating's counterclaim and defenses regarding infringement of Glidewell's rights in its unregistered BruxZir mark in violation of section 43(a) of the Lanham Act, 15 U.S.C. § 1125. *See Internet Specialties W., Inc. v. Milon-DiGiorgio Enterprises, Inc.*, 559 F.3d 985, 988 (9th Cir. 2009); see also Dairy Queen, Inc. v. Wood, 369 U.S. 469, 477 (1962).
- Keating's counterclaim for cancellation of the BruxZir mark and defense for invalidity. *See Gracie v. Gracie*, 217 F.3d 1060, 1065 (9th Cir. 2000).
- Keating's defense of fair use of the BruxZir mark. *See Horphag Research Ltd. v. Pellegrini*, 337 F.3d 1036, 1041 (9th Cir. 2003).

#### The following issues are triable to the Court:

- The Parties' unfair competition claims under section 17200 of the California Business & Professions Code. *See Hodge v. Superior Court*, 145 Cal. App. 4th 278, 284 (2006).
- Keating's defense of estoppel. *See Hamilton v. State Farm Fire & Cas. Co.*, 270 F.3d 778, 782 (9th Cir. 2001).
- Glidewell's and Keating's requests for injunctive relief. *See In re Tech. Licensing Corp.*, 423 F.3d 1286, 1289 (Fed. Cir. 2005).
- Whether the case is exceptional pursuant to 15 U.S.C. § 1117. *See Watec Co., Ltd. v. Liu*, 403 F.3d 645, 656 (9th Cir. 2005) (vacating and remanding fee award under 15 U.S.C. 1117(a) to district court because district court based exceptional determination on jury finding when it is for the court to decide exceptionality); 15 U.S.C. 1117(a) ("*The court* in exceptional cases may award reasonable attorney fees to the prevailing party") (emphasis added).
  - Keating's defense for misuse of a trademark and unclean hands. See

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1	Toyota Motor Sales	U.S.A., Inc.	v. Tabari,	610 F.3d	1171,	1184 (9th	Cir.	2010);
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- KEMA, Inc. v. Koperwhats, 658 F.Supp.2d 1022, 1035-36 (N.D. Cal. 2009)
- (defense of misuse of trademark is redundant with unclean hands).

#### VII. ATTORNEYS' FEES

If Glidewell prevails on the merits of its infringement claim, Glidewell will seek to recover its attorneys' fees on the grounds that this case is exceptional within the meaning of 15 U.S.C. § 1117(a). *See Earthquake Sound Corp. v. Bumper Indus.*, 352 F.3d 1210, 1216-17 (9th Cir. 2003) (awarding attorneys' fees to plaintiff in exceptional case and noting that "a case is exceptional within the meaning of 15 U.S.C. § 1117(a) where the infringement is willful, deliberate, knowing or malicious").

#### VIII. ABANDONMENT OF ISSUES

Glidewell has not abandoned any claims. Keating has abandoned its Second Counterclaim for common law unfair competition.

Dated: January 7, 2013 SNELL & WILMER L.L.P.

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